# INCOME VERIFICATION MATCH

# (IVM)

# USER MANUAL

## Version 2.0

## October 1994

# Revision History

**Please Note**:  Effective March, 2001, changes to IVM documentation resulting from released patches will be described in the Revision History section.  In lieu of change pages, the complete user manual will be released with the software patches associated with the changes described in this section.

| Revision Date | Description | Related Patch Number(S) | Author |
|---|---|---|---|
| 3/20/2001 | IVM Case Inquiry option - Revised Introduction section of to include Co-Pay Exemption Tests | IVM*2.0*17 | Karen Stella |
| 3/20/2001 | Added new option:  IVM Financial Query | IVM*2.0*17 | Karen Stella |
| 3/20/2001 | Updated fonts to comply with current documentation standards where applicable | N/A | Karen Stella |
| 3/20/2001 | Added Revision History section | N/A | Karen Stella |
| 3/20/2001 | Moved List Manager mnemonics into a table | N/A | Karen Stella |
| 8/1/2003 | Updated Demographics Upload option | IVM*2*79 | Karen Stella |
| 8/11/03 | Updated Demographics Upload option | IVM*2*79 | Karen Stella |
| 8/12/03 | Updated Revision History section | N/A | Karen Stella |
| 8/12/03 | Updated Orientation section | N/A | Karen Stella |
| 8/12/03 | Replaced "HEC" with "the HEC", where appropriate | N/A | Karen Stella |
| 8/12/03 | Corrected formatting of "**V*IST*A"** in text, where appropriate | N/A | Karen Stella |
| 8/12/03 | Updated Introduction section | N/A | Karen Stella |
| 8/12/03 | Updated references to Category C | N/A | Karen Stella |
| 8/12/03 | Updated references to Category A | N/A | Karen Stella |
| 8/12/03 | Updated headings format throughout manual | N/A | Karen Stella |
| 8/12/03 | Removed outdated Preface section | N/A | Karen Stella |
| 8/13/03 | Updated IVM Demographics Upload option | IVM*2*79 | Karen Stella |
| 8/13/03 | Added new option:  IVM Address Updates Pending Review | IVM*2*79 | Karen Stella |
| 9/12/03 | Updated IVM Demographics Upload option | IVM*2*79 | Karen Stella |
| 9/15/03 | Updated IVM Demographics Upload option | IVM*2*79 | Karen Stella |

# Table of Contents

# Introduction

## *Background*

Public Law 101-508 permits the Department of Veterans Affairs (VA) to verify income data with the Internal Revenue Service (IRS) and Social Security Administration (SSA) for veterans receiving VA health care services whose eligibility for medical care is based on income. The Income Verification Match (IVM) process for Veterans Health Administration (VHA) medical facilities is centralized and performed at the HEC in Atlanta, Ga.

## *Functionality*

IVM Version 2.0 provides all of the functionality required to complete the eligibility verification process. This primarily involves electronically receiving the revised VA Form 10-10F from the HEC and automatically filing the updated test in the V*IST*A Means Test module.

### User Interactive Functions
- View/verify patient demographic, insurance, and SSN information received from SSA and IRS
- Upload verified data
- View billing/collection and Means Test activity
- Configure, monitor, and purge the IVM system

### Noninteractive Functions
- Exchange of data, on an ad-hoc basis, between your facility and the HEC via electronic transmissions
- Scheduled transmission to the HEC of all Means Tests meeting IVM criteria via the Nightly Background Job, and IVM-related billing and collections activity

## *Integration*

IVM V. 2.0 provides functionality that impacts Registration, Medical Care Cost Recovery (MCCR), and IRM staff at your facility. It is highly integrated with the following packages.

### Patient Information Management System (PIMS)

- PIMS demographic, Means Test, and income information is sent to the HEC
- Means Test and demographic information verified by the HEC is uploaded into PIMS files

## Integrated Billing (IB)

- Patient insurance information is transmitted to the HEC
- Means Test charges are created in IB for patients who become MT Copay Required when a verified Means Test from IVM is transmitted to the facility
- Insurance information identified by IVM is uploaded into IB files
- IB provides billing and collections information, for billings resulting from IVM activity, that is transmitted back to the HEC

## Health Level 7 (HL7)

Provides the foundation for all communications between your facility and the HEC

## *Related Manuals*

|  |  |
|---|---|
| IVM V. 2.0 Technical Manual (includes Security section) | Technical and security information regarding operation and maintenance of the IVM system |
| IVM V. 2.0 Release Notes | New features and functions of the V. 2.0 software |
| IVM V. 2.0 Installation Guide | Information necessary to install the software |

# Package Management

Means Tests that meet the IVM criteria and billing/collections information for IVM-related bills are transmitted automatically to the HEC each evening during the nightly background job. Means Tests that have been verified by the HEC and transmitted back to the facility are automatically filed into **V***IST***A** upon receipt.

There are three parameters in the IVM SITE PARAMETERS File (#301.9) that can be used to suppress the generation of mail message notifications of demographic, insurance, and SSN transmissions received from the HEC.

Per VHA Directive 10-93-142, most of the IVM routines, data dictionaries, and data files are not to be modified.  Only the reports (located in the IVMR routine namespace) may be modified.

# Using the Software

## *IVM Upload Menu*
Demographics Upload



The Demographics Upload option is locked with the IVM UPLOAD security key.

**Introduction**

This option uses the List Manager utility to let you view, upload, and/or delete demographic information .  The List Manager screens display uploadable and non-uploadable demographic fields.  You can view, upload, and/or delete *uploadable* demographic data with this option.  You can view *non-uploadable* demographic data with this option; however, the *non-uploadable* data must be entered manually via the Load/Edit Patient Data or Register a Patient options in the PIMS Registration Menu.  Be sure to verify that the data is accurate before entering it manually.

You can choose to accept or reject updated address information with this option if
- The Bad Address Indicator (BAI) is NULL
                    *AND*
- The patient has an active Pharmacy prescription
                    *AND*
- Your VAMC receives an update for a patient's permanent mailing address

You can upload/delete complete addresses only (must take action on all address fields).  If you attempt to upload/delete an individual address field, a message is displayed indicating that if you choose to proceed, all address fields will be uploaded/deleted.  For uploading purposes, the following are considered address fields:  STREET ADDRESS [LINE 1], STREET ADDRESS [LINE 2], CITY, STATE, ZIP+4, COUNTY, and PHONE NUMBER [RESIDENCE].

If the incoming address (IVM Field Value) is older than the address currently already file at the VAMC (DHCP Field Value), a warning is displayed, and the software asks you to verify that you want to update the complete address.

If the patient you selected has an active prescription on file, and you are attempting to upload the complete address, a warning is displayed, and the software asks you to verify that you want to update the complete address.

If the IVM address fields (IVM Field Value) you are uploading do not include a phone number, but the V*IST*A address fields on file (DHCP Field Value) include a phone number, the software displays the patient's name and phone number and asks if you want to delete the phone number.

## *IVM Upload Menu*
## Demographics Upload

**Introduction, continued**

You can view, upload, and/or delete the *uploadable* data in the following PATIENT File (#2) fields when using this option.

| Field Number | Field Name |
|---|---|
| .118 | ADDRESS CHANGE DT/TM |
| .12 | ADDRESS CHANGE SITE |
| .119 | ADDRESS CHANGE SOURCE |
| .114 | CITY |
| .117 | COUNTY |
| .03 | DATE OF BIRTH |
| .351 | DATE OF DEATH |
| .131 | PHONE NUMBER [RESIDENCE] |
| .02 | SEX |
| .115 | STATE |
| .111 | STREET ADDRESS [LINE 1] |
| .112 | STREET ADDRESS [LINE 2] |
| .1112 | ZIP+4 |

You can view (but not upload or delete) the *non-uploadable* data in the following PATIENT File (#2) demographic fields when using this option:

| Filed Number | Field Name |
|---|---|
| .2916 | CITY (VA) |
| .314 | CLAIM FOLDER LOCATION |
| .382 | DATE MEDICAID LAST ASKED? |
| .291 | DATE RULED INCOMPETENT (VA) |
| .3611 | ELIGIBILITY STATUS |
| .3612 | ELIGIBILITY STATUS DATE |
| .3615 | ELIGIBILITY VERIF. METHOD |
| .381 | ELIGIBLE FOR MEDICAID? |
| .2912 | GUARDIAN (VA) |
| .2911 | INSTITUTION (VA) |
| .2919 | PHONE (VA) |
| .361 | PRIMARY ELIGIBILITY CODE |
| .293 | RATED INCOMPETENT? |
| .2913 | RELATIONSHIP (VA) |
| .115 | STATE (VA) |
| .2914 | STREET ADDRESS [LINE 1] (VA) |
| .2915 | STREET ADDRESS [LINE 2] (VA) |
| .2918 | ZIP (VA) |

## *IVM Upload Menu*
## Demographics Upload

**Introduction, continued**

In addition to the generic List Manager actions described in Appendix B of this manual, the following actions are also available when using this option:

| Short Name | Full Name | Brief Description |
|---|---|---|
| **From the IVM Demographic Screen** | | |
| DU | Display Uploadable | • Displays uploadable data for the selected patient on the Uploadable Demographics screen<br>• Provides List Manager actions to upload or delete demographic data |
| VN | View Non Uploadable | • Displays non-uploadable data for the selected patient on the Uploadable Demographics screen<br>• Provides List Manager action to delete demographic data |
| EH | Extended Help | |
| **From the Uploadable Demographics Screen** | | |
| UF | Upload Demographic Fields | |
| DF | Delete Demographic Fields | |
| **From the Non-Uploadable Demographics Screen** | | |
| DF | Delete Demographic Fields | |

**Example**

The IVM Demographic Upload screen displays a list of patients whose demographics information has changed and indicates whether there is uploadable/uploadable information.  This example assumes that you are going to upload address changes for STANLEY, JOSEPH, Patient #4.

```
IVM DEMOGRAPHIC UPLOAD          Sep 15, 2003@14:05:09          Page:   1 of
Patient Demographic Information
                                              Uploadable     Non-uploadable
     Patient Name                  Patient SSN  Demographics   Demographics
1    JACKSON,FRANK                 626-84-6304     YES             NO
2    JOHNSON,RANDOLPH              554-84-3405     YES             NO
3    MARTIN,SUSAN                  275-47-0316     YES             NO
4    STANLEY,JOSEPH                214-56-0893     YES             NO



         Enter ?? for more actions
DU Display Uploadable    VN View Non Uploadable    EH Extended Help
Select Action: Quit// DU=4   Display Uploadable
```

## *IVM Upload Menu*
## Demographics Upload

**Example, continued**

When address information is available for uploading, the Uploadable Demographics screen displays the current address information (DHCP Field Value) and the incoming data (IVM Field Value).

```
Uploadable Demographics       Sep 15, 2003@15:21:47       Page:   1 of   1
Patient: STANLEY,JOSEPH (0893)                 Uploadable Demographic Fields

    DHCP Field Name            DHCP Field Value     IVM Field Value
1  STREET ADDRESS [LINE 1]     11 EXIT NOT ALLOWED  502 SQA CHANGE
2  STREET ADDRESS [LINE 2]     (* NONE ON FILE *)   8/27 AVENUE B
3  CITY                        REDDING              REDDING
4  STATE                       CALIFORNIA           CALIFORNIA
5  ZIP+4                       96002                96002
6  COUNTY                      SHASTA               SHASTA
7  ADDRESS CHANGE SOURCE       VAMC                 HEC
8  ADDRESS CHANGE DT/TM        AUG 29, 2003@16:53:0 AUG 27, 2003@08:46:0


            Enter ?? for more actions
UF  Upload Demographic Fields         DF  Delete Demographic Fields
Select Action: Quit// UF   Upload Demographic Fields
Select FIELD(s):  (1-7): 1
You have selected to update an address field.
You will be required to upload the entire address.
Do you wish to proceed with this action? NO// YES
*** WARNING: This patient has ACTIVE PRESCRIPTIONS on file.
Are you sure that you want to update the complete address? NO// YES
Filing address fields... completed.
The patient's address has been updated and the phone number
remains on file.
Patient Name: STANLEY,JOSEPH (0893)
Phone Number [Residence]: 555-0088
Is it okay to delete the patient's Phone Number [Residence]? NO// <ENTER>   No
Patient's Phone Number [Residence] has not been deleted.
```

## *IVM Upload Menu*
Insurance Upload

The Insurance Upload option is locked with the IVM UPLOAD security key.

**Introduction**

This option is used to transfer to a temporary IB insurance buffer or purge patient insurance information transmitted to your facility from the HEC.  This is data received by the HEC from patients' employers.

Authorized insurance personnel process the data in the temporary insurance buffer.  They can upload the insurance data into the patient's permanent insurance records or purge the data.

If **V***IST***A** or IVM records show a date of death on a patient, it is indicated on the screen by an asterisk.  If that patient is selected, a message is displayed indicating that a date of death has been reported either by the HEC or **V***IST***A**.

Once action has been taken on the data, a confirmation message is automatically transmitted to the HEC.  The message includes the decision made at the site and, if the information was rejected, the reason the data was not uploaded.
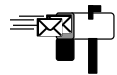
Adding a new policy for a patient generates a mail message to MCCR personnel listing the patient's potentially billable episodes of care since the effective date of the policy.

## *IVM Upload Menu*
## Insurance Upload

**Example**

Example 1 – Transfer IVM Insurance Policy to Insurance Module

```
IVM INSURANCE UPLOAD        Jul 28, 1994 16:24:50        Page:   1 of   1
The HEC has identified insurance for the following patients:
  (*) - Indicates Death Reported  Act
    Patient Name        SSN        Ins   Insurance Carrier        Subscriber ID
1   COOPER,DAVID       023-56-0730  NO   NATIONWIDE INSURANCE COM  DFS9732
2   DANIELS,JOHN       022-98-8887  NO   AETNA INSURANCE COMPA     029876587
3   NICHOLS,DAVID      054-77-3882  YES  TRAVELERS INSURANCE       2838B34H
4  *PAULEY,TIM         236-26-9525  YES  ALLSTATE INSURANCE COMPA  021670999
5   SHORT,MARVIN       021-45-6992  YES  BARRY SCOTT INSURANCE     00123ER45
6   WIES,MARK          508-01-0111  NO   NATIONWIDE INSURANCE COM  DFS7865




            Enter ?? for more actions
DE Display Entry          EH Extended Help
Select Action: Quit// de=4   Display Entry

'Date of Death' reported for this patient in DHCP as JUN 23, 1994.

Press RETURN to continue: <RET>
```

```
              INSURANCE POLICIES CURRENTLY ON FILE
    **********************************************************************
 Insurance Co.      Subscriber ID    Group       Holder  Effective Expires
 =====================================================================
 No Insurance Information

            INSURANCE POLICY RECEIVED FROM the HEC
    **********************************************************************
 Company: ALLSTATE INSURANCE COMPANY    Effective Date:  FEB  3, 1992
 Phone #: (919)548-9238                 Expiration Date: OCT 10, 1994
 Address:                               Subscriber ID: 021670999
   202 SUNSET DRIVE                     Policy Holder: SELF
   NEW YORK, NY 12509
                                        Group Name:    UMBRELLA GRP
                                        Group Number:  102
 Name of Insured: PAULEY,TIM            Pre-Cert. Req?: NO
                                        Plan Type: HEALTH MAINTENANCE ORGAN

Press RETURN to continue or '^' to return to display screen: <RET>
```

## *IVM Upload Menu*
## Insurance Upload

**Example, cont.**

```
      Select one of the following:

           1              Transfer IVM Insurance Policy to Insurance Module
           2              Purge IVM Insurance Policy
           3              Return to Display Screen

Select Action: ??

Entering '1' at this prompt will allow the user to upload the Insurance Policy
that was received from the HEC.  Entering '2' at this prompt will allow
the user to delete the Insurance Policy that was received from the HEC
Entering '3' or '^' will abort this action.

      Select one of the following:

           1              Transfer IVM Insurance Policy to Insurance Module
           2              Purge IVM Insurance Policy
           3              Return to Display Screen

Select Action: 1  Transfer IVM Insurance Policy to Insurance Module

Transferring HEC's insurance policy to insurance module completed.
Press RETURN to continue: <RET>
```

## *IVM Upload Menu*
## **Insurance Upload**

**Example, cont.**

Example 2 - Purge Insurance Policy

```
IVM  INSURANCE UPLOAD          Jul 28, 1994 16:24:50         Page:   1 of    1
the HEC has identified insurance for the following patients:
  (*) - Indicates Death Reported  Act
   Patient Name        SSN        Ins  Insurance Carrier        Subscriber ID
1   COOPER,DAVID       023-56-0730 NO   NATIONWIDE INSURANCE COM  DFS9732
2   DANIELS,JOHN       022-98-8887 NO   AETNA INSURANCE COMPA     029876587
3   NICHOLS,DAVID      054-77-3882 YES  TRAVELERS INSURANCE       2838B34H
4  *PAULEY,TIM         236-26-9525 YES  ALLSTATE INSURANCE COMPA  021670999
5   SHORT,MARVIN       021-45-6992 YES  BARRY SCOTT INSURANCE     00123ER45
6   WIES,MARK          508-01-0111 NO   NATIONWIDE INSURANCE COM  DFS7865




             Enter ?? for more actions
DE Display Entry          EH Extended Help
Select Action: Quit// de=4   Display Entry

'Date of Death' reported for this patient in DHCP as JUN 23, 1994.

Press RETURN to continue: <RET>
```

```
              INSURANCE POLICIES CURRENTLY ON FILE
    ***********************************************************************
 Insurance Co.      Subscriber ID     Group       Holder  Effective Expires
 ======================================================================
 ALLSTATE           021670999         102         SELF    02/03/92 10/10/94

           INSURANCE POLICY RECEIVED FROM the HEC
    ***********************************************************************
 Company: ALLSTATE INSURANCE COMPANY    Effective Date:  FEB  3, 1992
 Phone #: (919)548-9238                 Expiration Date: OCT 10, 1994
 Address:                               Subscriber ID: 021670999
   202 SUNSET DRIVE                     Policy Holder: SELF
   NEW YORK, NY 12509
                                        Group Name:    UMBRELLA GRP
                                        Group Number:  102
   Name of Insured: PAULEY,TIM          Pre-Cert. Req?: NO
                                        Plan Type: HEALTH MAINTENANCE ORGAN

Press RETURN to continue or '^' to return to display screen: <RET>
```

## *IVM Upload Menu*
## Insurance Upload

**Example, cont.**

```
     Select one of the following:

          1           Transfer IVM Insurance Policy to Insurance Module
          2           Purge IVM Insurance Policy
          3           Return to Display Screen

Select Action: 2 Purge IVM Insurance Policy
```

```
The 'Purge IVM Insurance Policy' action has been selected.

This action will cause the insurance information which has been
received from the HEC to be deleted from the system!

Please select a reason for purging the IVM insurance information.
Select reason for purging: ??

CHOOSE FROM:
   1      ALREADY HAVE INSURANCE POLICY
   2      DATA APPEARS TO BE INCORRECT
   3      INSURANCE COMPANY CLOSED
   4      POLICY PLAN TYPE IS HMO
   5      POLICY PLAN TYPE IS PPO
   6      POLICY COVERAGE EXPIRED
   7      POLICY BENEFITS FULLY USED
   8      BENEFITS NOT AVAILABLE
   9      COVERAGE FOR SPOUSE ONLY

Select reason for purging: 1      ALREADY HAVE INSURANCE POLICY

Are you sure that you want to purge IVM insurance data? NO// y  YES

Purging the 'Insurance Policy' received from IVM...   completed.

Press RETURN to continue: <RET>
```

## *IVM Upload Menu*
## Insurance Upload

**Example, cont.**

```
IVM INSURANCE UPLOAD        Jul 28, 1994 16:24:50        Page:    1 of    1
the HEC has identified insurance for the following patients:
  (*) - Indicates Death Reported  Act
    Patient Name      SSN          Ins  Insurance Carrier        Subscriber ID
1   COOPER,DAVID      023-56-0730  NO   NATIONWIDE INSURANCE COM  DFS9732
2   DANIELS,JOHN      022-98-8887  NO   AETNA INSURANCE COMPA     029876587
3   NICHOLS,DAVID     054-77-3882  YES  TRAVELERS INSURANCE       2838B34H
4   SHORT,MARVIN      021-45-6992  YES  BARRY SCOTT INSURANCE     00123ER45
5   WIES,MARK         508-01-0111  NO   NATIONWIDE INSURANCE COM  DFS7865




          Enter ?? for more actions
DE Display Entry        EH Extended Help
Select Action: Quit//
```

## *IVM Upload Menu*
SSN Upload

 The SSN Upload option is locked with the IVM UPLOAD security key.

**Introduction**

This option uses the List Manager utility to list SSNs for possible uploading to **V***IST***A**. SSNs for patient and spouse are returned from SSA as possible matches based on name, sex, and date of birth.

If **V***IST***A** or IVM records show a date of death on a patient, it is indicated on the screen by an asterisk. If that patient is selected, a message is displayed indicating that a date of death has been reported either by the HEC or **V***IST***A**.

You might first want to use the PRINT action to print the entire list to a printer for review and determination. (Two question marks (??) entered at the Select Action prompt gives you a complete list of available List Manager actions.)

Following are the two primary actions available.

>   *Upload* - to upload suggested SSNs to **V***IST***A**. In cases where there are suggested SSNs for both the veteran and spouse, you can upload one or both SSNs. Once an SSN is uploaded, it is no longer displayed on the screen.

>   *Purge* - If you determine that the SSA SSNs for a patient and/or spouse are not correct, you can purge the data from the file which removes it from the list.



SSNs are uploaded into PIMS files.

HL7 provides the foundation for all communications between your site and the HEC.

## IVM Upload Menu
## SSN Upload

**Example**

```
IVM SSN UPDATE                Jul 06, 1994 14:41:22        Page:    1 of    1
Income Verification Match                    Suggested SSA/SSNs for Uploading
   (*) - Indicates Date of Death Reported
     Patient Name    DHCP/SSN    SSA/SSN    Spouse's Name   DHCP/SSN    SSA/SSN
1    BAEZ,JOAN       123343243   123343244
2    DYLAN,ROBERT    022988887   222988887  DYLAN,MARY      444143309   444143399
3    HAVENS,RICHARD  309786612   399786612
4   *HENDRIX,JAMES   122114444   254773882
5   *JOPLIN,JANICE   236269525   236269255
6    SANTANA,CARLOS  444044040   444044044  SANTANA,LISA    773927409   779327409



          Enter ?? for more actions
UP   Update SSN           PU   Purge Entry
Select Action: Quit// UP=2    Update SSN
```

```
Update for patient DYLAN,ROBERT
Update the SSN for the 'V'eteran, 'S'pouse, or 'B'oth?:  (V/S/B): BOTH// <RET>

Are you sure you want to update this entry? NO// YES

   ...patient Social Security Number (SSN) has been updated.

Press RETURN to continue: <RET>

   ...spouse's Social Security Number (SSN) has been updated.

Press RETURN to continue: <RET>
```

```
IVM SSN UPDATE                Jul 06, 1994 14:41:22        Page:    1 of    1
Income Verification Match                    Suggested SSA/SSNs for Uploading
   (*) - Indicates Date of Death Reported
     Patient Name    DHCP/SSN    SSA/SSN    Spouse's Name   DHCP/SSN    SSA/SSN
1    BAEZ,JOAN       123343243   123343244
2    HAVENS,RICHARD  309786612   399786612
3   *HENDRIX,JAMES   122114444   254773882
4   *JOPLIN,JANICE   236269525   236269255
5    SANTANA,CARLOS  444044040   444044044  SANTANA,LISA    773927409   779327409



          Enter ?? for more actions
UP   Update SSN           PU   Purge Entry
Select Action: Quit//
```

## *IVM Output Menu*
## Billing Transmission Report

**Introduction**

This option generates a report of all IVM-related billing and collection activity that has been transmitted to the HEC. Information for each third party claim or Means Test charge is listed along with the date that the last transmission was sent to IVM. The report will also indicate whether any further transmissions will be sent to IVM.



Data from IB files are included in this report.

**Example**

```
This report will list all billing activity which has been, or will be,
transmitted to the IVM Center.  This includes Means Test charges for
patients who have changed categories due to IVM-verified Means Tests,
as well as claims to insurance companies for patients who have
insurance policies identified by the IVM Center.

Please note that this output requires 132 columns.  This report may not
run very quickly so you might choose to queue the report to a printer.

DEVICE: HOME// <RET>  Decnet     RIGHT MARGIN: 80// 132
```

```
Run Date: 08/11/94 8:19 am                    IVM BILLING TRANSMISSION REPORT
Page: 1

=================================================================================================================
                             Bill                                    Date      Amt     Amt     Date  Last
Patient Name   SSN          Clsf  Bill Type  Bill From  -   To  Generated  Billed    Coll    Trans Tran
=================================================================================================================

WAYNE,KAREN    578-03-3211  5003082  O    INS CLAIM  05/13/94  05/13/94  06/29/94    356.00      0.00  07/14/94 NO

BOTT,CHARLES   135-89-4444  5003086  O    COPAYMENT  12/10/93  12/10/93              36.00   --N/A--  Not Sent NO

RYAN,PETER     126-70-9989  5003080  I    PER DIEM   04/29/94  06/27/94  06/29/94    600.00   --N/A--  07/14/94 YES
                            5003081  I    COPAYMENT  04/29/94  04/29/94  06/29/94    696.00   --N/A--  07/14/94 YES

SAWYER,RON     241-80-1887  5003088  O    COPAYMENT  04/16/94  04/16/94              36.00   --N/A--  Not Sent NO
```

## *IVM Output Menu*
IVM Case Inquiry

**Introduction**

This option allows you to review the status of any Means Test or Co-Pay Exemption Test submitted to the HEC for verification.  All Means Test and billing/collection transmissions for the case are displayed.  Any uploadable data associated with the case is indicated.

The data used for this report is from the Means Test module of the PIMS software.

**Example**

```
Select PATIENT NAME: ADAMS,GEORGE        02-08-52      132456110      NO
     NSC VETERAN

  >>>> Case Record is for Income Year 1993 <<<<

DEVICE: HOME// <RET>  Decnet     RIGHT MARGIN: 80// <RET>
```

```
IVM Case Inquiry            Aug 11, 1994@08:24:17                    Page: 1
------------------------------------------------------------------------------
     Name: ADAMS,GEORGE                         Awaiting Trans: NO
      SSN: 132-45-6110                             Case Status: CLOSED
 Inc Year: 1993                         Full Transmission Sent: 07/14/94
  MT Date: 07/11/94  (MT COPAY EXEMPT)


==============================================================================

   --- T H I S   C A S E   R E C O R D   H A S   B E E N   C L O S E D ---

  Closure Reason: CASE WAS NOT VERIFIED
  Closure Source: IVM CENTER
    Closure Date: Jul 19, 1994@15:29:02
==============================================================================


Means Test Transmission History:
                                                  Transmitted As
  Trans Date/Time        Status                 MT Cat        Had Ins?
  --------------------------------------------------------------------
  Jul 14, 1994@09:29:32  RECEIVED               MT COPAY EXEMPT    NO
  Jul 19, 1994@12:27:34  RECEIVED               MT COPAY EXEMPT    NO
```

## *IVM Output Menu*
## Means Test Comparison Report

### Introduction

This management report provides a summary of all Means Tests for two consecutive years for veterans who are MT Copay Exempt or MT Copay Required.  It lists the total number of veterans in each category, the number of veterans who have changed Means Test category over the two year period, the number of new Means Tests (veterans Means Tested in the second year only) and the number of "non-returns" (veterans Means Tested in the first year only).  A detailed report listing each veteran with both years' Means Test category is also available.

This report could be run regularly to judge the shift of veterans from the mandatory to discretionary category, and to estimate the number of potential cases that will be referred to the HEC for verification.

All data used for this report is from PIMS files.

### Example

```
                   IVM MEANS TEST COMPARISON REPORT

   This report will be used to analyze consecutive years' Means Test data
   (i.e. 1991-1992).  Please enter the first year for the two year period
   which you would like to analyze.

Enter first means test YEAR (1986 - 1993): 1992   (1992)
   Means Test YEAR 1: 1992
   Means Test YEAR 2: 1993


Would you like to print patient data? NO// y   YES
   NOTE: The output is designed to use 80 columns.
DEVICE: HOME// <RET>  Decnet     RIGHT MARGIN: 80// <RET>
```

## *IVM Output Menu*
## Means Test Comparison Report

**Example, cont.**

```
  JUL 8,1994                                                  PAGE: 1
            M E A N S  T E S T  C O M P A R I S O N  R E P O R T
                        FOR YEARS: 1992 AND 1993
==============================================================================


     PATIENT                              SSN        MEANS TEST  MEANS TEST
                                                     CATEGORY    CATEGORY
                                                       1992        1993


   ABBOTT,JOHN A.                      411-01-0101       A           C
   ABOTT,JACK                          222-66-9999                   C
   ABRAMS,ROGER                        328-93-8276                   A
   ADAMS,FRANK                         098-57-4321                   A
   ADAMS,JOHN                          120-98-4587       A
   ADRIANCE,KENNETH                    108-10-9937       A           A
   AIELLO,FRANK                        134-09-7714                   C
```

```
  JUL 8,1994                                                  PAGE: 20
            M E A N S  T E S T  C O M P A R I S O N  R E P O R T
                        FOR YEARS: 1992 AND 1993
==============================================================================


SUMMARY OF MEANS TESTS FOR YEAR 1992
====================================
          TOTAL CAT A:   29
          TOTAL CAT C:   77
     TOTAL MEANS TESTS:  106

SUMMARY OF MEANS TESTS FOR YEAR 1993
====================================
          TOTAL CAT A:   36
          TOTAL CAT C:   45
     TOTAL MEANS TESTS:   81


       TOTAL NON-RETURNS FROM 1992 TO 1993:   89
    TOTAL NEW MEANS TESTS FROM 1992 TO 1993:   64
    TOTAL PATIENTS WHOSE CATEGORY CHANGED FROM A TO C:    2
    TOTAL PATIENTS WHOSE CATEGORY CHANGED FROM C TO A:    3
```

## *IVM Output Menu*
## IVM Address Updates Pending Review

**Introduction**

This option generates the IVM Automatic Address Upload Report.  The only prompt asks for a device.  The report displays the addresses that will be automatically uploaded to the VAMC if no other action is taken within 14 days from the date they are received at the VAMC.  The output includes the following information:

- Name of the report
- Date the report was generated
- Page number
- Date the update will be automatically uploaded to the VAMC if no other action is taken
- Date the update was received at the VAMC
- Patient's SSN
- Patient's name

This report might take some time to process, depending on the number of updates received at your facility.  You might want to queue the report to run during non-peak work hours.

**Example**

```
IVM AUTOMATIC ADDRESS UPLOAD RPT                JUN 11,2003            Page: 1
 ======================================================================

    Auto-Upload Date      Date Received       SSN           Patient Name
    ----------------      -------------       ---------     ------------
     Jun 23, 2003         Jun 09, 2003        432168014     MORGAN, LISA
     Jun 24, 2003         Jun 10, 2003        432168014     MORGAN, LISA

                              <<END OF REPORT>>
```

## *IVM System Manager's Menu*
## IVM Parameter Enter/Edit

This option is locked with the IVM SYS security key.

### Introduction

The IVM parameters control whether notification messages are sent to the IVM MESSAGES mail group when SSN, demographics, and insurance information is received from the HEC.  If no entry is made, the messages are generated.

Please refer to Appendix A of this manual for sample mail messages.

### Example

```
IVM Parameter Enter/Edit

SUPPRESS SSN UPLOAD MESSAGE: ?
    Enter 1 to suppress notification to facility that updated SSN data has
    been received from the IVM Center.  Enter 0 if facility is to be notified.
    Default is 0.
    CHOOSE FROM:
     1         SUPPRESS MESSAGE
     0         DON'T SUPPRESS MESSAGE
SUPPRESS SSN UPLOAD MESSAGE: 0   DON'T SUPPRESS MESSAGE
SUPPRESS INSURANCE MESSAGE: 0   DON'T SUPPRESS MESSAGE
SUPPRESS DEMOGRAPHIC MESSAGE: 0   DON'T SUPPRESS MESSAGE
```

## *IVM System Manager's Menu*
Purge IVM Transmissions



This option is locked with the IVM SYS security key.

**Introduction**

This option allows IRM staff to purge entries from the IVM TRANSMISSION LOG File (#301.6) that are associated with closed cases (entries in the IVM PATIENT File [#301.5]) from the previous Means Test year.

A notification is sent to the user indicating that the purge has completed, the total number of records checked, number of closed records found, and number of records deleted.

Please refer to Appendix A of this manual for a sample mail message.

**Example**

```
This option is used to purge data from the IVM TRANSMISSIONS File (#301.6).
Entries in this file will only be purged for corresponding case records
in the IVM PATIENT File (#301.5) which have been closed.

You may purge transmission records for an entire income year's worth of cases.
However, you must select an income year prior to the year which corresponds
to the current year's Means Tests.  Since this year's Means Tests are based
on 1993 income, you must select an income year prior to 1993.


Select the Income Year for which to purge transmissions: 1992   (1992)

Is it okay to queue this job? y   YES
Requested Start Time: NOW// <RET> (JUL 08, 1994@14:12:53)

This job has been queued.  The task number is 20474.
```

## *IVM System Manager's Menu*
IVM Transmission Report



This option is locked with the IVM SYS security key.

**Introduction**

The IVM Transmission Report allows you to analyze the number of Initial or Full transmissions leaving your facility for a specific date or range. The total number of transmissions is broken down by the transmission status:

> *Transmitted* - An attempt has been made to send the transmission to the HEC. The transmission may or may not have left your facility, but it has not been acknowledged by the HEC.

> *Received* - The transmission has been successfully acknowledged by the HEC.

> *In Error* - The transmission has been acknowledged by the HEC as having contained erroneous or invalid data.

> *Re-transmitted* - A transmission with the status of "transmitted" may be retransmitted after three days. At that time, a new transmission record is created. The status of the original transmission is updated to "retransmitted."

The number of multiple transmissions is listed. If more than one transmission for an income case has been sent to the HEC (this would occur if the Means Test or demographics data for the veteran was edited), each successive transmission is considered to be a multiple transmission for a specific income case.

Summary statistics for the number of MT Copay Exempt and MT Copay Required veterans with and without active insurance are provided. A listing of the receipt date and response date for each Master Query received by the facility is also included.

## *IVM System Manager's Menu*
## IVM Transmission Report

**Example**

```
    Select one of the following:

         1          SINGLE DATE REPORT
         2          DATE RANGE REPORT

Enter response: 2  DATE RANGE REPORT
Enter Start DATE:  7/1  (JUL 01, 1994)
Enter End DATE: 8/31  (AUG 31, 1994)
DEVICE: HOME// <RET>  Decnet    RIGHT MARGIN: 80// <RET>
```

```
===========================================================================
|            INCOME VERIFICATION MATCH - TRANSMISSIONS REPORT            |
|                                                                         |
|-------------------------------------------------------------------------|
|                      DATE PRINTED: AUG 31, 1994                         |
===========================================================================

      Date range selected: JUL 01, 1994  to  AUG 31, 1994


      Total number of days:                           62
      Total number of transmissions:                 248   (4.00/day)

        Without Status: 0                     In Error: 0
           Transmitted: 30              Re-transmitted: 33
              Received: 185      Multiple Transmissions: 118 (of 248)

                              With Insurance       Without Insurance
                              --------------       -----------------
   Percentage MT Copay Exempt:       2.82 %                 78.84 %
   Percentage MT Copay Required:     0.77 %                 14.11 %


          ** M A S T E R   Q U E R Y   S U M M A R Y **

      Query Income Year   Date Received       Date Responded
      -----------------   -----------------   -----------------
            1992          06/28/94 4:34 pm    06/28/94 11:32 pm
            1993          07/19/94 12:35 pm   07/19/94 11:31 pm
```

## *IVM Transmission Error Processing*

### Introduction

The Health Eligibility Center may respond to a patient transmission by returning an error message, which means they were unable to process the transmission.  The IVM Transmission Error Processing option allows you to work with lists of patients for which error messages were received in a List Manager format.  This information was previously viewed through "Erroneous Data Sent to the HEC" mail messages for each individual patient.

The contents of the list are selected by a user-specified date range.  The initial display shows the "New" process status and is sorted by patient name.  You may use the following actions to make changes to the displayed list.

| | |
|---|---|
| Change Date Range | Change the date range of the errors being viewed. |
| Change List | Change the error list being viewed.  You may choose to see errors with a status of new, checked, or both. |
| Check Error Off List | Changes the selected error with a status of New to a status of Checked.  Checked indicates the error has been viewed. |
| Retransmit Patient | Sets a flag to retransmit the selected patient.  The transmission will take place during the nightly job. |
| Sort List | Choose to sort the error list by patient name or date/time acknowledgment received. |

### Example

```
Select Beginning Date: OCT 07, 1997// <RET>   (OCT 07, 1997)
Select Ending Date: TODAY// <RET>   (OCT 21, 1997)
...EXCUSE ME, JUST A MOMENT PLEASE.......
```

# *IVM Transmission Error Processing*

**Example, cont.**

```
┌─────────────────────────────────────────────────────────────────────────┐
│ IVM Transmission Errors      Oct 21, 1997 08:45:48       Page:   1 of  13 │
│ Sort By: Patient Name                     Date Range: 10/07/97 thru 10/21/97│
│ Error Processing Statuses: New                                            │
│        Patient Name          PT ID    Date/Time ACK Received   Process Status│
│ 1      Amos,Samuel           1555     Oct 07, 1997 13:48:29    New         │
│   Error: PATIENT NAME INVALID                                             │
│ 2      Caine,Peter           1555     Oct 07, 1997 13:48:30    New         │
│   Error: PATIENT NAME INVALID                                             │
│ 3      Jones,Mark            1558     Oct 07, 1997 13:48:29    New         │
│   Error: PATIENT SSN INVALID                                              │
│ +          * = Patient has been flagged for transmission            >>>   │
│ CD   Change Date Range    CL  Change List         SL  Sort List           │
│ CE   Check Error Off List RP  Retransmit Patient                          │
│ Select Action: Next Screen// CE    Check Error Off List                   │
│ Select Transmission Error(s):  (1-3): 1                                    │
└─────────────────────────────────────────────────────────────────────────┘
```

```
┌─────────────────────────────────────────────────────────────────────────┐
│ IVM Transmission Errors      Oct 21, 1997 08:45:48       Page:   1 of  13 │
│ Sort By: Patient Name                     Date Range: 10/07/97 thru 10/21/97│
│ Error Processing Statuses: New                                            │
│        Patient Name          PT ID    Date/Time ACK Received   Process Status│
│ 1      Amos,Samuel           1555     Oct 07, 1997 13:48:29    Checked     │
│   Error: PATIENT NAME INVALID                                             │
│ 2      Caine,Peter           1555     Oct 07, 1997 13:48:30    New         │
│   Error: PATIENT NAME INVALID                                             │
│ 3      Jones,Mark            1558     Oct 07, 1997 13:48:29    New         │
│   Error: PATIENT SSN INVALID                                              │
│ +          * = Patient has been flagged for transmission            >>>   │
│ CD   Change Date Range    CL  Change List         SL  Sort List           │
│ CE   Check Error Off List RP  Retransmit Patient                          │
│ Select Action: Next Screen//                                              │
└─────────────────────────────────────────────────────────────────────────┘
```

## *IVM Financial Query*

**Introduction**

The IVM Main Menu allows you to manually generate financial queries to the HEC for patients that require updated income Means Test, Copay Test, and Income Screening information.  The prompts ask you to select a patient, verify that you want to send a financial query, and if you want to receive notification when a reply is received.

You cannot send a query if

- A query is already pending for the selected patient.
- No financial query is required for the selected patient.  (For example, the patient is in Enrollment Priority Group 1.)

**Example**

```
This option allows queries to be sent to the Health Eligibility
Center (HEC) for patients that require updated income information.

Select PATIENT NAME: NICHOLSON,A  NICHOLSON,A        3-26-66    105032666
     NO     NSC VETERAN    SH
Enrollment Priority:            Category: IN PROCESS    End Date:


               *** Patient Requires a Means Test ***

        Patient's Test dated DEC 21,1998 is MT COPAY EXEMPT. The test
        date is greater than 365 days old.  Please update.

Enter <RETURN> to continue.

Financial query queued to be sent to the HEC...



Would you like to send a financial query for this patient? YES//

Do you want to be notified when a query reply is received? YES//

Failure to send query: A FINANCIAL QUERY IS CURRENTLY OPEN OR JUST SENT
```

# Glossary

This glossary contains terms and their definitions as they relate to the IVM package.

MT Copay Exempt veteran  A patient who, as a result of Means Testing, is in the mandatory category in regard to eligibility for VA care.

MT Copay Required veteran  A patient who, as a result of Means Testing, is in the discretionary category in regard to eligibility for VA care.

full data transmission  A complete information profile transmitted to the HEC containing patient demographic, eligibility, Means Test, income, insurance, and enrollment information.

HEC  Health Eligibility Center (formerly IVM Center)

HL7  Health Level 7 is an interface specification designed to standardize the way in which health care information is transferred between systems.  IVM utilizes the V*ISTA* HL7 package to assist in transporting data using this specification.

IRS  Internal Revenue Service

IVM  Income Verification Match.  A program designed to verify income and insurance data reported by the veteran with that received from IRS (Internal Revenue Service), SSA (Social Security Administration), and other sources.

Means Test

Eligibility for VA hospital care and nursing home care is divided into two categories - mandatory and discretionary. An income assessment is made to determine whether a non service-connected veteran, who is not in receipt of VA monetary benefits or otherwise exempt from income assessment, is eligible for cost-free VA medical care. This income assessment is known as "Means Testing." Patients whose income is above the defined income levels must agree to make copayments to VA for outpatient and inpatient care rendered.

SSA

Social Security Administration

suggested SSN

Patient or spouse SSNs returned from SSA as possible matches based on name, sex, and date of birth. These SSNs will be validated by the HEC before being returned to the field facilities.

third party claim

When a party other than the patient, such as an insurance company, is billed.

**Military Time Conversion Table**

| STANDARD | MILITARY |
|----------|----------|
| 12:00 MIDNIGHT | 2400 HOURS |
| 11:00 PM | 2300 HOURS |
| 10:00 PM | 2200 HOURS |
| 9:00 PM | 2100 HOURS |
| 8:00 PM | 2000 HOURS |
| 7:00 PM | 1900 HOURS |
| 6:00 PM | 1800 HOURS |
| 5:00 PM | 1700 HOURS |
| 4:00 PM | 1600 HOURS |
| 3:00 PM | 1500 HOURS |
| 2:00 PM | 1400 HOURS |
| 1:00 PM | 1300 HOURS |
| 12:00 NOON | 1200 HOURS |
| 11:00 AM | 1100 HOURS |
| 10:00 AM | 1000 HOURS |
| 9:00 AM | 0900 HOURS |
| 8:00 AM | 0800 HOURS |
| 7:00 AM | 0700 HOURS |
| 6:00 AM | 0600 HOURS |
| 5:00 AM | 0500 HOURS |
| 4:00 AM | 0400 HOURS |
| 3:00 AM | 0300 HOURS |
| 2:00 AM | 0200 HOURS |
| 1:00 AM | 0100 HOURS |

# Appendix A - Sample Mail Messages

Following are samples of the types of electronic mail notifications generated by the IVM software.  You might also receive messages generated by other V*ISTA* software packages, such as the notification generated by PIMS to indicate a changed SSN, or the notification of new insurance sent by IB.

*The patient's name and last four digits of the SSN have been added to the subject line of some messages with patch number IVM\*2\*3.*

## *Receipt of Demographics Transmission*

```
Subj: IVM - DEMOGRAPHIC UPLOAD for COOPER  (0730)   [#117940] 25 Jul 94 14:33
  11 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
-----------------------------------------------------------------------------

Updated demographic information has been received from the Income
Verification Match Center.  Please select the 'Demographics Upload'
option from the IVM Upload Menu in order to take action on this
demographic information.  If you have any questions concerning the
demographic information received from the IVM Center, please contact
the Income Verification Match Center.

The Income Verification Match Center has identified the following
patients as having updated demographic information:

   1)  COOPER,DAVID (0730)

Select MESSAGE Action: IGNORE (in IN basket)//
```

## *Receipt of Insurance Transmission*

```
Subj: IVM - INSURANCE UPLOAD for COOPER  (0730)   [#117939] 26 Jul 94 09:33
  12 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
-----------------------------------------------------------------------------

The Income Verification Match Center has identified patients
having updated insurance information.  Please select the
'Insurance Upload' option from the IVM Upload Menu in order to take
action against this updated insurance information.  If you
have any questions concerning updated insurance information
please contact the Income Verification Match Center.

The Income Verification Match Center has identified the
following patients as having updated insurance information:

   1)  COOPER,DAVID (0730)

Select MESSAGE Action: IGNORE (in IN basket)//
```

## *Receipt of SSA/SSN Transmission*

```
Subj: IVM - SSA/SSN UPLOAD  [#117931] 25 Jul 94 15:33  11 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
--------------------------------------------------------------------------
Updated SSA/SSNs have been received from the Income Verification
Match Center.  Please select the 'SSN Upload' option from the
IVM Upload Menu in order to upload these SSA/SSNs.  If you have any
questions concerning these updated SSA/SSNs, please contact the
Income Verification Match Center.

The following patient's have SSA/SSNs to be uploaded:


    1)   COOPER,DAVID (0730)
    2)   SHORT,MARVIN (6992)


Select MESSAGE Action: IGNORE (in IN basket)//
```

## *Completed Purge of IVM Transmission Records*

```
Subj: COMPLETED PURGE OF IVM TRANSMISSION RECORDS  [#186481] 11 Aug 94 08:04  11 Lines
From: INCOME VERIFICATION MATCH PACKAGE  in 'IN' basket.   Page 1  **NEW**
-------------------------------------------------------------------------
The purge of data from the IVM TRANSMISSIONS File (#301.6) has completed.

  Job Start Date/Time: AUG 11, 1994@08:09:28
    Job End Date/Time: AUG 11, 1994@08:19:26


                                Income Year: 1992

     Total number of case file records checked: 2236
           Number of closed case records found: 340
     Number of IVM TRANSMISSION records deleted: 697
```

## IVM - Means Test Upload

```
Subj: IVM - MEANS TEST UPLOAD            [#117931] 25 Jul 94 15:33  7 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
------------------------------------------------------------------------------

The following error occurred when an Income Verification Match verified
Means Test was being uploaded for the following patient:

    NAME:      MOORE,DAVE
    ID:        345-23-8405
    ERROR:     Can't find 408.12 record
```

```
Subj: IVM - MEANS TEST UPLOAD for MOORE  (8405)   [#117931] 25 Jul 94 15:33
  11 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
------------------------------------------------------------------------------

An Income Verification Match verified Means Test has been uploaded
for the following patient:

    NAME:           MOORE,THOMAS
    ID:             345-23-8405
    DATE OF TEST:   SEP 12, 1993
    PREV CATEGORY:  A
    NEW CATEGORY:   C
    DATE/TIME OF ADJUDICATION:  SEP 18,1994@11:21

The patient is now NON-EXEMPT for prescription copay.

The patient's current Means Test status is now MT COPAY REQUIRED.

The patient is MT COPAY REQUIRED and doesn't agree to pay deductible.
```

## IVM - Means Test Deleted

```
Subj: IVM - MEANS TEST DELETED            [#190091] 28 Sep 94 15:46  6 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
------------------------------------------------------------------------------

An Income Verification Match Means Test was deleted for the
following patient:

    NAME:           STILLS,JOHN
    ID:             433-21-0000
    TEST DATE :     AUG 16,1994

NOTE:  The original DHCP Means Test is now the primary Means Test.
```

## Messages Awaiting Transmission

Sent when MailMan V. 7.1 is installed at the site and a message is awaiting transmission to the HEC.

```
Subj: MESSAGES 'AWAITING TRANSMISSION'    [#117931] 25 Jul 94 15:33  6 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
--------------------------------------------------------------------------

    Mailman message number 435938 is awaiting transmission.
    Please call the IVM Center (Atlanta, GA) to play a script
    if unable to complete script from your end.

    Please note that you may have other messages that are awaiting
    transmission to the IVM Center.
```

## Error Message From the HEC

```
Subj: ERROR MESSAGE FROM THE IVM CENTER  [#188441] 02 Sep 94 13:16  9 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1
----------------------------------------------------------------------
An Insurance Confirmation message or a Billing/Collections Transmission
was rejected by the IVM Center with the following error:

  Patient ID/SSN not in IVM database - DFN 150

Mailman Message # of Acknowledged Transmission: 187928

If you are unable to find the source of this problem,
please contact your ISC Support Group or the IVM Center.
```

## Missing Primary Long ID Field

```
Subj: MISSING PRIMARY LONG ID FIELD   [#195643] 22 Mar 95 07:51  5 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1
----------------------------------------------------------------------
During Income Verification Match processing, the PRIMARY LONG ID field
(.363) of PATIENT File (#2) is missing for the following patient:

    NAME:     SMITH,JOHN
    DFN:      7169017
```

# Appendix B - List Manager

The List Manager is a tool used to display a list of items in a screen format with the following functionality.

- Browse through the list
- Select items that need action
- Take action against those items
- Select other List Manager actions without leaving the option

Actions are selected by entering the name or mnemonic at the "Select Action:" prompt. Entries may be preselected in the following manner:

DU=1    will display upload for entry 1

In addition to the various actions that are available specific to the option you are using, List Manager provides generic actions applicable to any List Manager screen. You may enter double question marks (??) at the "Select Action" prompt for a list of all actions available. The table below lists generic List Manager actions with a brief description. Entering the mnemonic is the quickest way to select an action.

| Action | Mnemonic | Description |
|--------|----------|-------------|
| Next Screen | + | Move to the next screen |
| Previous Screen | - | Move to the previous screen |
| Up a Line | UP | Move up one line |
| Down a Line | DN | Move down one line |
| Shift View to Right | > | Move the screen to the right if the screen width is more than 80 characters |
| Shift View to Left | < | Move the screen to the left if the screen width is more than 80 characters |
| First Screen | FS | Move to the first screen |
| Last Screen | LS | Move to the last screen |
| Go to Page | GO | Move to any selected page in the list |
| Re Display Screen | RD | Redisplay the current screen |
| Print Screen | PS | Print the header and the portion of the list currently displayed |
| Print List | PL | Print the list of entries currently displayed |
| Search List | SL | Find selected text in list of entries |
| Auto Display(On/Off) | ADPL | Toggle the menu of actions to be displayed/not displayed automatically |
| Quit | QU | exits the screen |

# Index

**U**